

RENTAL MARKET REPORT

OTTAWA*

OCTOBER 2005

OTTAWA VACANCY RATE DROPS

Ottawa's vacancy rate for private rental apartments decreased to 3.3 per cent in October 2005, down from last October's six-year high of 3.9 per cent. Rising home ownership carrying costs, limited rental construction, stronger youth employment and continued net youth in-migration contributed to tighter rental market conditions. Vacancy rate decreases were widespread, occurring in seven of CMHC's 11 survey zones for Ottawa. Average rents for most suite types and in most zones edged down due to softer rental market conditions that prevailed last year. The availability rate, which includes units that may be vacated over the next few months, declined to 5.7 per cent in October 2005 from 6.7 per cent in October 2004.

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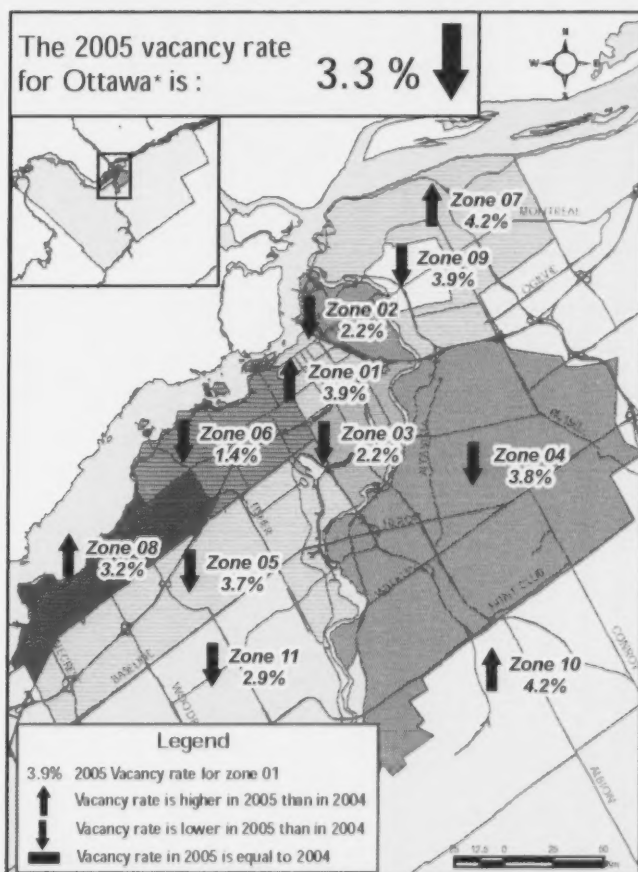
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* Includes only the Ontario portion of the Ottawa-Gatineau CMA.



Factors Boosting Demand

Young adults moving to Ottawa

An important factor driving demand for rental accommodations comes from continued net in-migration of young people to an area. In the Ontario portion of the National Capital region, Statistics Canada reports that the movement of people between 15-24 years of age grew by nearly 11,000 in the 2000-2004 period.

The growth in the population between 15-24 years of age to Ottawa in recent years should have kept vacancy rates low. However, this boost has been countered by excellent home ownership affordability brought on by low interest rates.

Comparing the average vacancy rate in Ontario's 11 Census Metropolitan Areas (CMA's) with population data shows that vacancy rates from 1986 to 2000 moved inversely with the number of 15-24 year olds. Starting in 2001, mortgage rates dropped and started to boost ownership in these markets, enticing many potential young renters to skip the rental stage in their housing life cycle in favour of ownership.

Stronger Youth Employment

A second factor boosting rental demand this year resulted from slightly stronger youth employment. Job changes among young people have historically been related inversely to vacancy rates. From January to September, Statistics Canada estimates that the number of jobs held by persons 15-24 years of age rose 7.4 per cent from the equivalent 2004 period.

Home ownership becoming less affordable

While low mortgage rates have inversely impacted the rental markets in recent years, there are signs that home ownership in the Ottawa housing market is becoming less affordable. This could be of actor to explain why vacancy rates have tighten in Ottawa this year.

Rapid house price increases have outweighed low mortgage rates to bring up carrying costs faster than the average two-bedroom rents. Between 2001 and 2005, the price of Ottawa's average-priced resale home rose 41 per cent (to \$247,906) and the estimated principle and interest carrying cost on this home rose 26 per cent to

\$1,289. By contrast, the average two bedroom rent rose only one per cent (including this year's rent dip to \$920). For the first time since 1998, the estimated principle and interest carrying cost on Ottawa's average-priced condominium (\$181,034 in 2005 to September) was \$941, above two bedroom apartment's average \$920 rent.

As a result, mortgage carrying costs appear to have outpaced the ability of tenants to support a mortgage when compared to the cost of renting a two bedroom apartment.

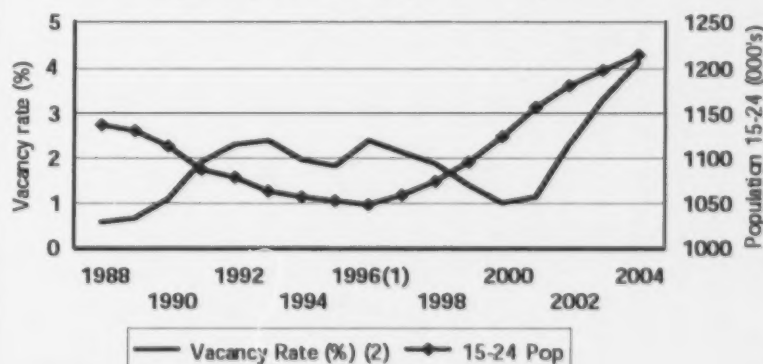
New Rental Construction Down

In terms of supply, lower rental starts have played a role in easing Ottawa's vacancy rate. Rental construction moves inversely to the vacancy rate. From 1993 to 2000, the vacancy rate rose to an eight year average of 2.9 per cent and rental starts during that period decreased to an average 199 units. From 2000, the reverse occurred as a drop in the vacancy rate to 0.2 per cent coincided with a surge in rental starts that year. As vacancy rates rose over the next four years, rental construction tailed off again.

Increased construction of such units adds indirectly to the supply of rental accommodations in the market because condo units are purchased by investors who in turn rent them out. Strong condominium construction in the last few years means that some rental condos have been added to the greater private rental market.

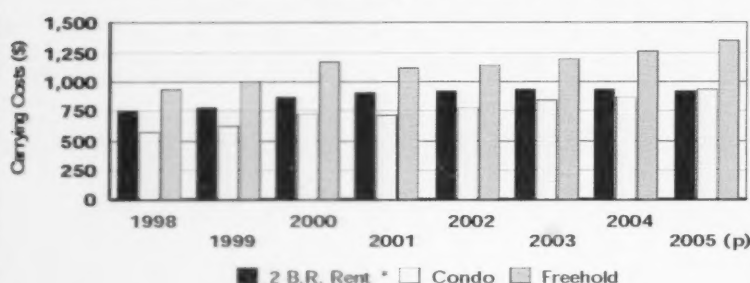
While this report focuses on Ottawa, the rental market in Gatineau also needs to be considered in terms of its impact on Ottawa. In the last decade, the vacancy rate in Gatineau was above that of Ottawa's despite much lower average rents. Since 2000, average two bedroom rents in Gatineau have increased c

Rates Up Despite Growing Youth Population



(1) Data on 2001 Census boundaries.
(2) In apartments with at least six units. Weighted by 2004 universe.
Source: Statistics Canada, CMHC

Renting Cheaper than Owning



Source: Ottawa Real Estate Board, Bank of Canada, CMHC
(p) To September

compared to Ottawa, thereby widening the gap between the two cities. As a result, demand across the river picked up and the vacancy rate there has been below Ottawa's since 2001.

Gatineau's relatively tight market since 2001 has caused average rents to rise faster than in Ottawa, lifting rents and closing the gap between them. This change in relative rents has helped prompt a rebalancing of the two cities' vacancy rate: Gatineau's rose this year, while Ottawa's fell.

Availability Rate Drops

This is the second year in a row that CMHC officially publishes an availability rate for Canada. According to our October 2005 survey, the availability rate in Ottawa declined by over one full percentage point to 5.6 per cent. This new rate which captures both current vacant stock and stock that may be vacant over the next few months seems to have moved down in tandem with the traditional vacancy rate.

Vacancy Rate Decreases

Ottawa's vacancy rate decrease in private rental apartments follows four successive annual increases, which took the local rate from 0.2 per cent in 2000 to 3.9 per cent in

2004. While the latter figure represents the peak of a softening rental market, this year's figure remains above Ottawa's average 2.5 per cent posted during the previous ten Octobers.

By contrast, Gatineau's private rental apartment vacancy rate rose to a six-year high of 3.1 per cent in October 2005, from 2.1 per cent recorded back in October 2004. Gatineau's vacancy rate rise follows a run-up in that area's apartment starts, where there was an average of 570 rental starts in the 2002-2004 period - this is more than double the area's previous three year average volume.

Looking at vacancy rates by bedroom type, the rate decreased from 4.0 per cent to 3.1 per cent for one bedroom units and from 4.0 per cent to 3.4 per cent for two bedroom suites. These are Ottawa's most numerous bedroom types, making up more than 80 per cent of the local rental stock. The drop in the number of vacant units for the former outweighed any increases in vacancies that occurred among bachelor apartments and apartments with three or more bedrooms.

Rents Soften

With Ottawa achieving a six-year high vacancy rate in 2004, these softer rental market conditions

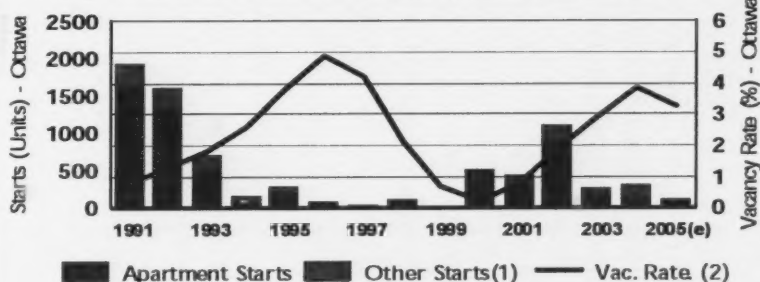
caused average rents to edge down. Average rents in private rental apartments fell among one, two and three+ bedroom suites; only bachelor units registered an increase. Specifically, the overall average rent for the one and two bedrooms fell by 1.2 per cent and 2.1 per cent respectively, leaving Ottawa's average one bedroom rent at \$762 and two bedroom rent at \$920. The strongest decline in rent was in Ottawa's small collection of three+ bedroom units, dropping by under three per cent to \$1,125. As mentioned above, the average rent for all bachelor suites rose by almost one per cent.

Softer rental market conditions also prevailed on the other side of the Ottawa River, thereby causing a reduction in average rents as well. The average rent for a two bedroom rent declined by less than one per cent to \$663, the first such drop since 1998. Declining rents on both sides of the River is indicative of the softer rental market conditions that prevailed throughout the Capital Region last year.

The evidence from our 2005 survey results shows that zones where average rents declined between 2004 and 2005 also recorded decreases in their area vacancy rate, demonstrating that the decline in the vacancy rate was caused to some extent by lowered rents. Ottawa's lowest 2005 apartment vacancy rates were found in the zones of the Glebe/Old Ottawa South, Sandy Hill/Lowertown and Nepean/Kanata: their rates averaged 2.4 per cent. These same areas recorded declines in the average rent for two-bedroom units.

Ottawa's newest buildings, those completed in 2000 and later, obtained the highest local vacancy rate of 9.0 per cent. These buildings have relatively high rents of \$1,406 among two bedroom suites, almost 39 per cent above the \$1,011 found in those buildings completed between

High Vacancies Discouraged Rental Construction



(e) Pro-rated annual starts based on year-over-year change through September
 (1) Single, Semi Row. (2) In apartments with at least three units
 Source: CMHC

1990 to 1999. Much higher rents charged in the newer buildings puts them at a less competitive advantage with tenants over other rental stock that is not as new. Occupants of the newest, higher rent buildings are probably among the most financially able to purchase a home.

Judging from our survey results, tenants in Ottawa prefer to live in larger buildings. The vacancy rate for structures with 50 units or more was lower than among structures containing fewer. The quality of the stock may be an issue here, as structures with less units are usually older while most newer construction is of higher density. It is also important to highlight that though the rents for higher density structures are higher, they also recorded declines in rent between 2004 and 2005 compared to those of less density.

Vacancy rate by quintile ranges reveals that the lowest vacancy rate occurred in the 4th interquintile range, declining from 3.5 per cent in 2004 to 2.4 per cent this year - average rent for the 4th interquintile range is \$874. The next lowest vacancy rate was for the 3rd interquintile range, with the vacancy rate falling to 2.6 per cent in 2005; average rent for the 3rd interquintile range is \$795 this year. At the highest interquintile range (5th interquintile range with an average rent of \$1,147), there was no change from last year and the vacancy rate remained at 3.9 per cent, while the 2nd interquintile range (average rent of \$723) showed a modest decline in 2005 to 3.5 per cent. The 1st interquintile range (the most affordable average rents at \$623) showed little change in 2005, with a vacancy rate of 4.6 per cent.

Apartment Vacancy Rates (%) by Major Centres

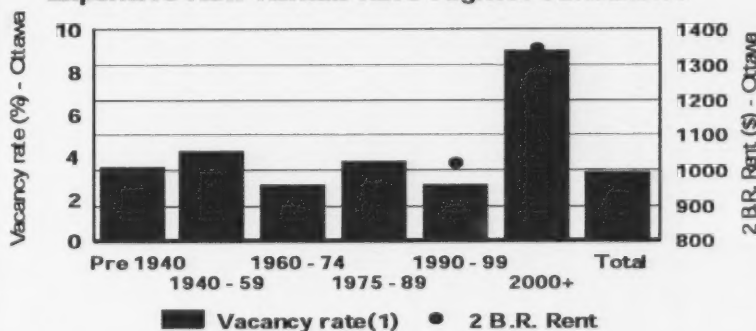
	2004	2005
Abbotsford	2.8	3.8
Calgary	4.3	1.6
Edmonton	5.3	4.5
Gatineau	2.1	3.1
Greater Sudbury	2.6	1.6
Halifax	2.9	3.3
Hamilton	3.4	4.3
Kingston	2.4	2.4
Kitchener	3.5	3.3
London	3.7	4.2
Montréal	1.5	2.0
Oshawa	3.4	3.3
Ottawa	3.9	3.3
Québec	1.1	1.4
Regina	2.7	3.2
Saguenay	5.3	4.5
Saint John	5.8	5.7
Saskatoon	6.3	4.6
Sherbrooke	0.9	1.2
St. Catharines-Niagara	2.6	2.7
St. John's	3.1	4.5
Thunder Bay	5.0	4.6
Toronto	4.3	3.7
Trois-Rivières	1.2	1.5
Vancouver	1.3	1.4
Victoria	0.6	0.5
Windsor	8.8	10.3
Winnipeg	1.1	1.7
Total	2.7	2.7

National Apartment Vacancy Rate Stabilizes

The average rental apartment vacancy rate in Canada's 28 major centres¹ was unchanged at 2.7 per cent in October 2005 compared to last year. This follows three consecutive increases in the vacancy rate over the 2002 to 2004 period. The vacancy rate remains below the average of 2.8 per cent observed over the 1995 to 2004 period.

Thanks to a solid economy and strong job creation, household formation has been healthy, which has promoted demand for both ownership and rental housing. The stabilizing of the vacancy rate across the major centres reflects a number

Expensive New Rentals have Highest Vacancies



(1) For all units in these structures
 Source: CMHC

of factors. As the majority of new immigrants initially settle in rental housing, high levels of immigration have been a key driver of rental demand over the past year. Also, across most centres, more renters are remaining in rental units as the gap between the cost of home ownership and renting increased in 2005. These two factors have put downward pressure on vacancy rates over the past year.

On the other hand, home ownership demand remained very strong, which can be seen from the record level of existing home sales in 2005. Strong home ownership demand continues to apply upward pressure on vacancy rates. Adding to this is the high level of condominium completions in some centres. Condominiums are a relatively inexpensive form of housing that are often purchased by renter households switching to home ownership. In some cases, condos supplement the rental market as they may be purchased by investors who, in turn,

rent them out. Therefore, high levels of condominium completions have created competition for the rental market and have put upward pressure on vacancy rates.

Even though the average rental apartment vacancy rate has moved higher in recent years, many households are still facing affordability issues across Canada. Either these households need to move to less expensive units or require additional help to make their monthly shelter costs more affordable. In some cases, however, there are not enough vacant units to meet the needs of all households in core housing need. Therefore, additional affordable housing units continue to be required.

The centres with the highest vacancy rates in 2005 were Windsor (10.3 per cent), Saint John (NB) (5.7 per cent), Saskatoon (4.6 per cent), Thunder Bay (4.6 per cent), Edmonton (4.5 per cent), St. John's (NFLD) (4.5 per cent), and Saguenay (4.5 per cent). On the other hand, the major

urban centres with the lowest vacancy rates were Victoria (0.5 per cent), Sherbrooke (1.2 per cent), Québec (1.4 per cent), Vancouver (1.4 per cent), Trois-Rivières (1.5 per cent), Calgary (1.6 per cent), and Greater Sudbury (1.6 per cent).

Average rents for two-bedroom apartments increased in 25 of the 28 major centres. However in 15 of the 25 major centres where rents were up, the increases were small. The greatest increases occurred in Kitchener, Victoria, and Quebec where rents were up 6.0 per cent, 4.8 per cent, and 4.2 per cent, respectively. Overall, the average rent for two-bedroom apartments across Canada's 28 major centres increased by 1.6 per cent in October 2005 compared to last year.

The highest average monthly rents for two-bedroom apartments were in Toronto (\$1,052), Vancouver (\$1,004), and Ottawa (\$920), while the lowest were in Trois-Rivières (\$474) and Saguenay (\$472).

¹ Major centres are based on Statistics Canada Census Metropolitan Areas (CMA) with the exception of the Ottawa-Gatineau CMA which is treated as two centres for Rental Market purposes.

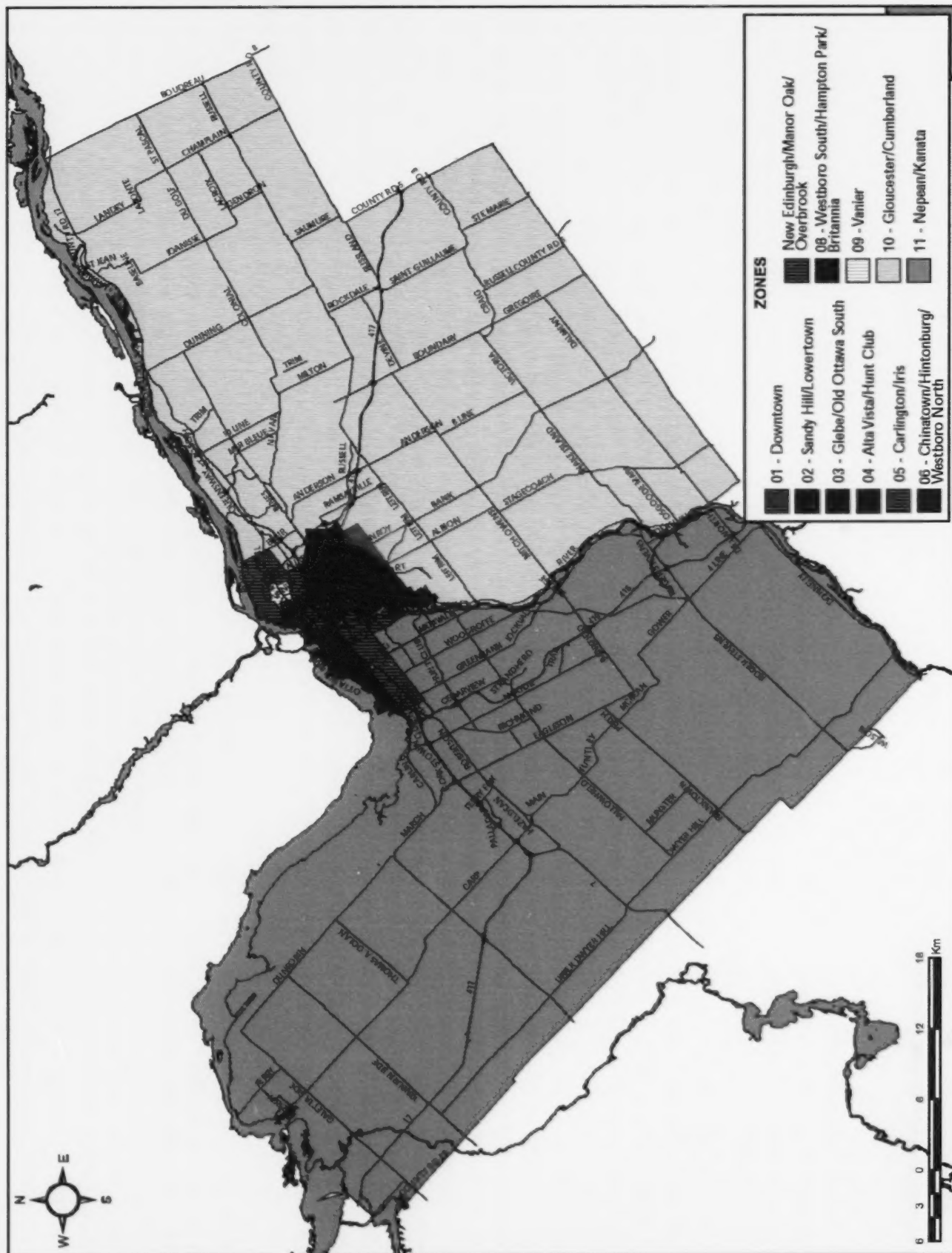
FORECAST FOR OTTAWA

Ottawa's vacancy rate will be near three per cent in 2006 as steady rental demand continues and with little rental supply additions expected. Moderate mortgage rate increases, along with continued house price advances, will boost the cost of home ownership and keep more renters in the rental market and stem the flight to home owner market. Already this year, the principle and interest charges on Ottawa's average condominium exceeded two bedroom apartment rents.

In terms of boosting demand, the number of prime - aged renters (15-24 years of age) is at a robust level by recent standards. The latest available migration data suggest young persons continue to move here. Employment in this age group has recently risen strongly as well.

Recent additions to rental supply have been modest; an annual average under 300 units in 2003-2004, compared to over 430 units on average in each of the prior five years.

Since a vacancy rate around three per cent remains above the 10 year average for Ottawa, expect rent increases to lag inflation next year. Current annual forecasts for inflation are around two per cent, so Ottawa's two-bedroom apartment rate will rise just over two per cent from \$920 this year to about \$940 next year.



ZONE DESCRIPTIONS - OTTAWA-GATINEAU CMA (ONTARIO PORTION)	
Zone 1	Downtown - Bounded by Queensway (south), Bronson (west), Ottawa River (north), Rideau Canal (east).
Zone 2	Sandy Hill/Lowertown - Includes Sandy Hill and Lowertown.
Zone 3	Glebe/Old Ottawa South - Includes the Glebe and Old Ottawa South.
Zone 4	Alta Vista/Hunt Club - Includes Alta Vista and Hunt Club.
Zone 5	Carlington/Iris - Includes the area south of Carling Ave., west of Bronson and the Rideau River and north of Beatrice (Carlington and Iris).
Zone 6	Chinatown/Hintonburg/Westboro North - Includes Chinatown, Hintonburg and Westboro north of Richmond Rd.
Zone 7	New Edinburgh/Manor Park/Overbrook - Includes the former township of Osgoode, and the municipalities of Clarence-Rockland and Russell.
Zone 8	Westboro South/Hampton Park/Britannia - Includes Westboro South, Hampton Park and Britannia.
Zones 1-8	Former City of Ottawa
Zone 9	Vanier - Includes Vanier.
Zone 10	Gloucester/Cumberland - Includes the former municipalities of Gloucester, Cumberland, Clarence-Rockland, Russell and Osgoode.
Zone 11	Nepean/Kanata - Includes the former municipalities of Kanata, Nepean, West Carleton, Goulbourn and Rideau.
Zones 1-11	Ottawa-Gatineau CMA (Ontario portion)

Zone Realignment and Census Tract Revision

For a number of centres, the zones were realigned to better match existing neighbourhoods (see zone descriptions) and, in some cases, the zones were renumbered. At the same time, the census tracts, which make up the zones, were revised to make them correspond to the 2001 census boundaries (as determined by Statistics Canada). The result of these two actions is the following: the universe size, the vacancy rate and the average rent reported for year 2004 in the 2004 rental market publications may be different from the year 2004 numbers reported in the 2005 reports.

Rental Market Report Tables

Available in ALL Rental Market Reports

Private Apartment Data:

- 1.1.1 Vacancy Rates (%) by Zone and Bedroom Type
- 1.1.2 Average Rents (\$) by Zone and Bedroom Type
- 1.1.3 Number of Units - Vacant and Universe by Zone and Bedroom Type
- 1.1.4 Availability Rates (%) by Zone and Bedroom Type
- 1.2.1 Vacancy Rates (%) by Year of Construction and Bedroom Type
- 1.2.2 Average Rents (\$) by Year of Construction and Bedroom Type
- 1.3.1 Vacancy Rates (%) by Structure Size and Bedroom Type
- 1.3.2 Average Rents (\$) by Structure Size and Bedroom Type
- 1.4 Vacancy Rates (%) by Rent Range and Bedroom Type

Available in SELECTED Rental Market Reports

Private Apartment Data:

- 1.3.3 Vacancy Rates (%) by structure Size and Zone

Private Row (Townhouse) Data:

- 2.1.1 Vacancy Rates (%) by Zone and Bedroom Type
- 2.1.2 Average Rents (\$) by Zone and Bedroom Type
- 2.1.3 Number of Units - Vacant and Universe by Zone and Bedroom Type
- 2.1.4 Availability Rates (%) by Zone and Bedroom Type

Private Apartment and Row (Townhouse) Data:

- 3.1.1 Vacancy Rates (%) by Zone and Bedroom Type
- 3.1.2 Average Rents (\$) by Zone and Bedroom Type
- 3.1.3 Number of Units - Vacant and Universe by Zone and Bedroom Type
- 3.1.4 Availability Rates (%) by Zone and Bedroom Type

1.1.1 Private Apartment Vacancy Rates (%)
by Zone and Bedroom Type
Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	3.0	3.9	2.4	3.0	2.5	5.8	8.0	4.4	2.7	3.9
Sandy Hill/Lowertown	3.7	2.7	2.5	2.7	4.6	1.5	0.9	1.0	3.2	2.2
Glebe/Old Ottawa South	1.8	3.3	2.8	2.4	1.9	2.0	**	**	2.5	2.2
Alta Vista/Hunt Club	4.2	7.3	4.6	3.5	4.5	3.6	1.1	5.6	4.4	3.8
Carlington/Iris	2.4	3.8	3.7	3.1	4.3	4.5	3.9	4.4	3.9	3.7
Chinatown/Hintonburg/Westboro N	5.0	1.1	5.2	1.6	1.5	1.4	**	**	4.2	1.4
New Edinb./Manor Park/Overbrook	**	**	4.6	4.9	2.4	3.6	**	6.1	3.3	4.2
Westboro S/Hampton Pk/Britannia	1.9	3.1	2.2	3.9	3.2	2.6	0.6	**	2.6	3.2
Former City of Ottawa	3.3	3.4	3.4	3.1	3.5	3.4	2.3	2.8	3.4	3.2
Vanier	**	**	6.2	4.4	4.7	3.7	**	**	5.2	3.9
Gloucester/Cumberland	**	1.7	4.2	1.9	2.0	3.6	1.8	18.0	2.7	4.2
Nepean/Kanata	3.6	5.7	8.8	2.9	7.3	3.0	7.2	1.9	7.7	2.9
Ottawa	3.2	3.4	4.0	3.1	4.0	3.4	3.3	4.1	3.9	3.3

1.1.2 Private Apartment Average Rents (\$)
by Zone and Bedroom Type
Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +	
	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	646	657	828	842	1,161	1,127	1,366	1,205
Sandy Hill/Lowertown	639	652	889	869	1,129	1,071	1,359	1,399
Glebe/Old Ottawa South	**	**	781	749	1,054	993	**	**
Alta Vista/Hunt Club	622	619	743	730	900	872	1,134	1,175
Carlington/Iris	626	606	740	697	853	842	1,144	1,107
Chinatown/Hintonburg/Westboro N	562	584	715	711	872	889	**	**
New Edinb./Manor Park/Overbrook	**	**	796	814	979	957	**	**
Westboro S/Hampton Pk/Britannia	637	627	747	747	889	915	1,082	**
Former City of Ottawa	624	630	781	772	963	946	1,217	1,194
Vanier	**	**	656	648	756	751	**	**
Gloucester/Cumberland	**	646	753	729	859	822	1,009	928
Nepean/Kanata	681	660	758	751	969	941	1,036	1,054
Ottawa	623	628	771	762	940	920	1,156	1,125

** : Data suppressed to protect confidentiality or because data is not statistically reliable

n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

**1.1.3 Number of Private Apartment Units Vacant and Universe in October 2005
by Zone and Bedroom Type
Ottawa**

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total
Downtown	55	1,404	150	5,022	130	2,231	10	233	345	8,890
Sandy Hill/Lowertown	24	878	79	2,934	26	1,734	5	480	134	6,026
Glebe/Old Ottawa South	9	283	36	1,525	26	1,279	**	**	72	3,273
Alta Vista/Hunt Club	23	316	163	4,656	158	4,332	20	359	363	9,663
Carlington/Iris	18	473	100	3,268	114	2,537	8	183	240	6,461
Chinatown/Hintonburg/Westboro N	7	632	39	2,432	15	1,039	**	**	61	4,251
New Edinb./Manor Park/Overbrook	**	**	68	1,380	61	1,703	10	157	144	3,447
Westboro S/Hampton Pk/Britannia	13	413	108	2,750	63	2,385	**	**	184	5,704
Former City of Ottawa	155	4,604	743	23,966	591	17,240	54	1,905	1,543	47,715
Vanier	**	**	74	1,697	72	1,962	**	**	157	3,988
Gloucester/Cumberland	2	116	16	937	65	1,800	43	239	126	2,992
Nepean/Kanata	8	139	54	1,880	102	3,448	7	357	172	5,824
Ottawa	169	5,018	888	28,380	831	24,450	110	2,670	1,998	60,519

**1.1.4 Private Apartment Availability Rates (%)
by Zone and Bedroom Type
Ottawa**

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	6.2	6.7	4.7	5.1	4.8	7.8	8.6	7.0	5.1	6.1
Sandy Hill/Lowertown	6.2	3.6	3.9	4.8	5.4	3.7	0.9	1.8	4.5	4.1
Glebe/Old Ottawa South	5.4	5.8	4.7	4.5	4.2	3.0	**	**	4.6	3.9
Alta Vista/Hunt Club	6.7	10.5	7.6	5.5	8.1	6.5	4.2	10.0	7.7	6.3
Carlington/Iris	5.5	5.1	6.8	5.4	6.6	8.0	5.5	7.5	6.6	6.5
Chinatown/Hintonburg/Westboro N	8.7	2.1	7.8	2.7	4.2	2.8	**	**	6.9	2.6
New Edinb./Manor Park/Overbrook	**	**	6.8	6.7	5.8	5.5	**	6.7	6.2	5.9
Westboro S/Hampton Pk/Britannia	4.9	3.9	4.6	5.6	6.1	5.1	3.4	**	5.3	5.3
Former City of Ottawa	6.4	5.1	5.9	5.0	6.2	5.8	4.0	5.1	6.0	5.3
Vanier	**	**	9.6	6.6	6.6	6.3	**	**	7.8	6.4
Gloucester/Cumberland	**	4.3	7.1	5.0	4.3	4.8	1.8	20.9	5.2	6.2
Nepean/Kanata	7.9	9.3	13.2	7.2	12.8	7.3	12.9	5.3	12.8	7.2
Ottawa	6.3	5.2	6.6	5.3	7.0	6.0	5.6	6.7	6.7	5.6

** : Data suppressed to protect confidentiality or because data is not statistically reliable

n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

1.2.1 Private Apartment Vacancy Rates (%)
by Year of Construction and Bedroom Type
Ottawa

Year of Construction	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Ottawa										
Pre 1940	6.9	5.4	4.1	3.9	3.7	2.7	3.9	2.7	4.4	3.5
1940 - 1959	2.9	3.4	4.7	4.5	3.8	4.4	4.6	3.5	4.1	4.3
1960 - 1974	2.1	2.3	3.6	2.7	4.0	2.8	2.9	2.3	3.6	2.7
1975 - 1989	3.5	6.5	4.8	3.2	3.8	3.5	3.1	10.3	4.2	3.8
1990 - 1999	**	**	**	3.3	3.5	2.0	**	**	3.6	2.7
2000+	**	**	4.7	5.7	10.2	10.8	n/s	**	8.7	9.0
Total	3.2	3.4	4.0	3.1	4.0	3.4	3.3	4.1	3.9	3.3

1.2.2 Private Apartment Average Rents (\$)
by Year of Construction and Bedroom Type
Ottawa

Year of Construction	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +	
	2004	2005	2004	2005	2004	2005	2004	2005
Ottawa								
Pre 1940	574	584	752	756	978	959	1,253	1,153
1940 - 1959	576	612	693	696	830	817	1,076	995
1960 - 1974	645	637	770	760	928	912	1,155	1,174
1975 - 1989	645	633	793	761	978	921	1,135	1,033
1990 - 1999	**	**	**	975	1,020	1,011	**	**
2000+	**	**	1,111	1,241	1,349	1,406	n/s	**
Total	623	628	771	762	940	920	1,156	1,125

1.3.1 Private Apartment Vacancy Rates (%)
by Structure Size and Bedroom Type
Ottawa

Size	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Ottawa										
3 to 5 Units	7.3	4.7	4.5	4.1	4.1	3.0	2.5	2.8	4.2	3.4
6 to 19 Units	5.6	5.3	5.7	4.6	3.9	3.7	6.1	4.2	4.7	4.2
20 to 49 Units	4.4	4.4	4.4	4.6	4.6	5.0	2.8	3.2	4.4	4.7
50 to 99 Units	2.0	2.9	4.3	3.5	4.9	3.2	6.3	3.1	4.3	3.3
100 to 199 Units	2.0	3.0	3.3	2.8	3.4	3.1	1.5	2.2	3.2	2.9
200+ Units	2.6	2.2	3.6	2.1	4.2	3.3	2.5	6.0	3.7	2.8
Total	3.2	3.4	4.0	3.1	4.0	3.4	3.3	4.1	3.9	3.3

** : Data suppressed to protect confidentiality or because data is not statistically reliable

n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

1.3.2 Private Apartment Average Rents (\$) by Structure Size and Bedroom Type Ottawa

Size	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +	
	2004	2005	2004	2005	2004	2005	2004	2005
Ottawa								
3 to 5 Units	554	542	699	704	877	866	1,101	999
6 to 19 Units	557	580	699	700	846	842	1,191	1,164
20 to 49 Units	601	621	737	736	889	881	1,135	1,127
50 to 99 Units	629	642	791	775	965	935	1,101	1,082
100 to 199 Units	650	638	783	773	987	961	1,111	1,121
200+ Units	668	646	802	789	990	961	1,217	1,180
Total	623	628	771	762	940	920	1,156	1,125

1.3.3 Private Apartment Vacancy Rates (%) by Structure Size and Zone Ottawa

Zone	3-5		6-19		20-49		50-99		100-199		200+	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	5.6	5.8	4.0	6.6	3.4	3.2	2.7	2.6	0.9	1.3	2.4	8.0
Sandy Hill/Lowertown	3.5	1.2	4.6	2.5	3.6	4.3	2.6	1.9	0.2	0.5	**	**
Glebe/Old Ottawa South	1.9	4.3	3.1	1.2	2.5	3.4	**	**	**	**	2.5	1.7
Alta Vista/Hunt Club	**	**	3.4	3.7	12.0	13.5	5.2	2.7	3.8	4.9	4.7	2.6
Carlington/Iris	5.6	**	6.6	4.3	8.9	10.5	4.5	**	1.7	2.1	2.4	3.0
Chinatown/Hintonburg/Westboro N	5.2	0.8	**	1.3	4.5	1.1	4.5	2.6	2.9	0.8	4.0	1.4
New Edinb./Manor Park/Overbrook	**	5.6	**	5.2	5.1	9.4	4.8	7.2	2.3	1.4	**	**
Westboro S/Hampton Pk/Britannia	**	**	4.6	4.7	6.2	10.9	3.8	3.8	2.6	4.5	1.5	0.7
Former City of Ottawa	3.9	3.9	4.6	3.9	4.8	5.6	3.7	3.2	2.3	2.9	3.2	2.5
Vanier	5.2	1.9	5.0	5.9	5.1	1.8	**	**	n/u	n/u	**	**
Gloucester/Cumberland	10.1	7.8	3.7	1.6	0.5	1.3	1.9	0.5	1.1	1.9	4.1	8.2
Nepean/Kanata	**	2.5	6.6	4.0	3.3	1.4	8.8	4.9	8.5	3.0	8.4	1.7
Ottawa	4.2	3.4	4.7	4.2	4.4	4.7	4.3	3.3	3.2	2.9	3.7	2.8

1.4 Private Apartment Vacancy Rates (%) by Rent Range and Bedroom Type Ottawa

Rent Range	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Ottawa										
LT \$700	3.9	3.4	6.1	5.0	3.4	4.2	**	**	5.1	4.5
\$700 - \$799	2.2	3.2	4.2	2.3	4.3	4.6	**	**	4.2	3.0
\$800 - \$899	**	**	2.7	1.7	4.9	3.1	0.0	**	4.0	2.6
\$900 - \$999	**	**	1.6	2.6	3.4	2.2	2.7	9.2	2.9	3.1
\$1000 - \$1199	**	**	1.2	1.0	4.4	3.7	5.4	3.7	4.3	3.4
\$1200+	**	**	**	**	4.7	4.8	3.0	1.8	4.4	4.7
Total	3.2	3.4	4.0	3.1	4.0	3.4	3.3	4.1	3.9	3.3

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n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

2.1.1 Private Row (Townhouse) Vacancy Rates (%) by Zone and Bedroom Type Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	**	**	**	**	0.0	**	**	**	1.9	**
Sandy Hill/Lowertown	n/u	n/u	**	**	0.0	0.0	2.7	**	1.5	3.7
Glebe/Old Ottawa South	n/u	n/u	**	**	**	**	1.8	1.8	1.5	1.5
Alta Vista/Hunt Club	n/u	n/u	n/u	n/u	2.9	9.0	4.8	6.7	4.6	6.9
Carlington/Iris	n/u	n/u	n/u	n/u	5.6	**	5.7	**	5.7	**
Chinatown/Hintonburg/Westboro N	**	**	9.1	0.0	**	**	15.2	10.0	12.0	5.2
New Edinb./Manor Park/Overbrook	**	**	**	**	0.8	1.5	3.1	3.8	1.9	4.7
Westboro S/Hampton Pk/Britannia	n/u	n/u	n/u	n/u	**	**	**	5.4	**	**
Former City of Ottawa	**	**	1.2	27.6	2.1	2.2	4.5	4.9	3.6	4.8
Vanier	n/u	n/u	n/u	n/u	**	**	8.9	11.1	8.3	10.4
Gloucester/Cumberland	n/u	n/u	n/u	n/u	**	1.3	3.5	3.7	3.4	3.5
Nepean/Kanata	**	**	**	**	6.6	4.7	4.3	3.8	4.8	4.0
Ottawa	0.0	0.0	1.1	26.5	4.4	3.4	4.3	4.1	4.2	4.2

2.1.2 Private Row (Townhouse) Average Rents (\$) by Zone and Bedroom Type Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +	
	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	**	**	**	**	**	**	**	**
Sandy Hill/Lowertown	n/u	n/u	**	**	**	**	**	**
Glebe/Old Ottawa South	n/u	n/u	**	**	**	**	**	1,355
Alta Vista/Hunt Club	n/u	n/u	n/u	n/u	**	**	1,135	1,164
Carlington/Iris	n/u	n/u	n/u	n/u	999	**	1,005	**
Chinatown/Hintonburg/Westboro N	**	**	601	677	**	**	**	**
New Edinb./Manor Park/Overbrook	**	**	**	**	**	838	958	945
Westboro S/Hampton Pk/Britannia	n/u	n/u	n/u	n/u	**	**	**	**
Former City of Ottawa	**	**	**	**	905	895	1,057	1,074
Vanier	n/u	n/u	n/u	n/u	**	n/s	1,158	**
Gloucester/Cumberland	n/u	n/u	n/u	n/u	**	1,110	1,040	1,061
Nepean/Kanata	**	**	**	**	984	992	1,090	1,114
Ottawa	563	594	**	**	945	951	1,071	1,092

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n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

**2.1.3 Number of Private Row (Townhouse) Units Vacant and Universe in October 2005
by Zone and Bedroom Type
Ottawa**

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total
Downtown	**	**	**	**	**	**	**	**	**	**
Sandy Hill/Lowertown	n/u	n/u	**	**	0	26	**	**	2	60
Glebe/Old Ottawa South	n/u	n/u	**	**	**	**	1	55	1	65
Alta Vista/Hunt Club	n/u	n/u	n/u	n/u	7	78	52	775	59	853
Carlington/Iris	n/u	n/u	n/u	n/u	**	**	**	**	**	**
Chinatown/Hintonburg/Westboro N	**	**	0	13	**	**	5	49	5	94
New Edinb./Manor Park/Overbrook	**	**	**	**	8	519	21	557	53	1,127
Westboro S/Hampton Pk/Britannia	n/u	n/u	n/u	n/u	**	**	2	40	**	**
Former City of Ottawa	**	**	28	102	20	895	87	1,786	135	2,792
Vanier	n/u	n/u	n/u	n/u	**	**	5	45	5	48
Gloucester/Cumberland	n/u	n/u	n/u	n/u	1	79	44	1,193	45	1,272
Nepean/Kanata	**	**	**	**	43	923	113	2,984	156	3,914
Ottawa	0	12	28	106	64	1,900	249	6,008	341	8,026

**2.1.4 Private Row (Townhouse) Availability Rates (%)
by Zone and Bedroom Type
Ottawa**

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	n/a	**	n/a	**	n/a	**	n/a	**	n/a	**
Sandy Hill/Lowertown	n/a	n/u	n/a	**	n/a	0.0	n/a	**	n/a	3.7
Glebe/Old Ottawa South	n/a	n/u	n/a	**	n/a	**	n/a	1.8	n/a	1.5
Alta Vista/Hunt Club	n/a	n/u	n/a	n/u	n/a	10.3	n/a	9.9	n/a	10.0
Carlington/Iris	n/a	n/u	n/a	n/u	n/a	**	n/a	**	n/a	**
Chinatown/Hintonburg/Westboro N	n/a	**	n/a	0.0	n/a	**	n/a	10.0	n/a	5.2
New Edinb./Manor Park/Overbrook	n/a	**	n/a	**	n/a	2.5	n/a	5.9	n/a	6.2
Westboro S/Hampton Pk/Britannia	n/a	n/u	n/a	n/u	n/a	**	n/a	5.4	n/a	**
Former City of Ottawa	n/a	**	n/a	31.6	n/a	3.3	n/a	7.0	n/a	6.7
Vanier	n/a	n/u	n/a	n/u	n/a	**	n/a	13.3	n/a	12.5
Gloucester/Cumberland	n/a	n/u	n/a	n/u	n/a	3.8	n/a	6.9	n/a	6.7
Nepean/Kanata	n/a	**	n/a	**	n/a	9.0	n/a	6.6	n/a	7.2
Ottawa	n/a	0.0	n/a	30.4	n/a	6.1	n/a	6.8	n/a	7.0

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n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

3.1.1 Private Row (Townhouse) and Apartment Vacancy Rates (%)
by Zone and Bedroom Type
Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	3.0	3.9	2.4	3.1	2.5	5.9	7.9	4.1	2.7	3.9
Sandy Hill/Lowertown	3.7	2.7	2.5	2.7	4.5	1.5	1.1	1.4	3.2	2.2
Glebe/Old Ottawa South	1.8	3.3	2.8	2.4	1.9	2.0	3.6	0.8	2.4	2.2
Alta Vista/Hunt Club	4.2	7.3	4.6	3.5	4.5	3.7	3.6	6.3	4.4	4.0
Carlington/Iris	2.4	3.8	3.7	3.1	4.4	4.3	5.0	2.6	4.0	3.6
Chinatown/Hintonburg/Westboro N	5.0	1.1	5.3	1.6	1.7	1.4	**	2.5	4.4	1.5
New Edinb./Manor Park/Overbrook	**	**	4.4	6.4	2.0	3.1	2.3	4.3	2.9	4.3
Westboro S/Hampton Pk/Britannia	1.9	3.1	2.2	3.9	3.2	2.6	1.0	1.1	2.6	3.2
Former City of Ottawa	3.3	3.4	3.4	3.2	3.4	3.4	3.4	3.8	3.4	3.3
Vanier	**	**	6.2	4.4	4.7	3.7	**	**	5.3	4.0
Gloucester/Cumberland	**	1.7	4.2	1.9	2.0	3.5	3.2	6.1	2.9	4.0
Nepean/Kanata	3.5	5.6	8.8	2.9	7.2	3.3	4.6	3.6	6.6	3.4
Ottawa	3.2	3.4	4.0	3.2	4.1	3.4	4.0	4.1	4.0	3.4

3.1.2 Private Row (Townhouse) and Apartment Average Rents (\$)
by Zone and Bedroom Type
Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +	
	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	646	656	827	842	1,160	1,127	1,337	1,198
Sandy Hill/Lowertown	639	652	888	869	1,127	1,071	1,343	1,385
Glebe/Old Ottawa South	**	**	781	749	1,054	993	**	**
Alta Vista/Hunt Club	622	619	743	730	901	874	1,134	1,167
Carlington/Iris	626	606	740	697	862	852	1,062	1,053
Chinatown/Hintonburg/Westboro N	562	584	714	710	873	892	**	**
New Edinb./Manor Park/Overbrook	**	**	796	809	951	929	976	976
Westboro S/Hampton Pk/Britannia	637	627	747	747	889	914	1,047	**
Former City of Ottawa	624	630	781	772	960	943	1,134	1,135
Vanier	**	**	656	648	756	751	**	**
Gloucester/Cumberland	**	646	753	729	858	834	1,035	1,039
Nepean/Kanata	681	661	757	751	972	952	1,084	1,108
Ottawa	623	628	771	762	941	922	1,096	1,102

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n/u : No units exist in the universe for this category

n/s : No units exist in the sample for this category

n/a : Not applicable

3.1.3 Number of Private Row (Townhouse) and Apartment Units Vacant and Universe in October 2005 by Zone and Bedroom Type

Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total
Downtown	55	1,409	154	5,051	131	2,239	10	254	351	8,953
Sandy Hill/Lowertown	24	878	79	2,942	26	1,760	7	507	136	6,086
Glebe/Old Ottawa South	9	283	36	1,527	26	1,287	2	241	73	3,338
Alta Vista/Hunt Club	23	316	163	4,656	165	4,410	72	1,134	422	10,516
Carlington/Iris	18	473	100	3,268	117	2,733	12	446	247	6,920
Chinatown/Hintonburg/Westboro N	7	634	39	2,445	15	1,068	5	198	66	4,345
New Edinb./Manor Park/Overbrook	**	**	92	1,430	69	2,222	31	714	197	4,574
Westboro S/Hampton Pk/Britannia	13	413	108	2,750	63	2,416	2	197	186	5,775
Former City of Ottawa	155	4,613	772	24,068	611	18,135	141	3,691	1,678	50,507
Vanier	**	**	74	1,697	72	1,965	**	**	162	4,036
Gloucester/Cumberland	2	116	16	837	66	1,879	87	1,432	171	4,264
Nepean/Kanata	8	142	54	1,884	145	4,371	120	3,341	328	9,738
Ottawa	169	5,030	916	28,486	895	26,350	359	8,679	2,339	68,545

3.1.4 Private Row (Townhouse) and Apartment Availability Rates (%)

by Zone and Bedroom Type

Ottawa

Zone	Bachelor		1 Bedroom		2 Bedroom		3 Bedroom +		Total	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
Downtown	n/a	6.7	n/a	5.2	n/a	7.8	n/a	7.0	n/a	6.1
Sandy Hill/Lowertown	n/a	3.6	n/a	4.8	n/a	3.7	n/a	2.2	n/a	4.1
Glebe/Old Ottawa South	n/a	5.8	n/a	4.5	n/a	2.9	n/a	1.7	n/a	3.8
Alta Vista/Hunt Club	n/a	10.5	n/a	5.5	n/a	6.6	n/a	10.0	n/a	6.6
Carlington/Iris	n/a	5.1	n/a	5.4	n/a	7.5	n/a	3.9	n/a	6.1
Chinatown/Hintonburg/Westboro N	n/a	2.0	n/a	2.7	n/a	2.7	n/a	3.0	n/a	2.6
New Edinb./Manor Park/Overbrook	n/a	**	n/a	8.1	n/a	4.8	n/a	6.1	n/a	6.0
Westboro S/Hampton Pk/Britannia	n/a	3.9	n/a	5.6	n/a	5.1	n/a	5.0	n/a	5.3
Former City of Ottawa	n/a	5.1	n/a	5.1	n/a	5.7	n/a	6.0	n/a	5.4
Vanier	n/a	**	n/a	6.6	n/a	6.3	n/a	**	n/a	6.5
Gloucester/Cumberland	n/a	4.3	n/a	5.0	n/a	4.8	n/a	9.2	n/a	6.3
Nepean/Kanata	n/a	9.1	n/a	7.2	n/a	7.6	n/a	6.5	n/a	7.2
Ottawa	n/a	5.2	n/a	5.4	n/a	6.0	n/a	6.8	n/a	5.8

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n/u : No units exist in the universe for this category

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n/a : Not applicable

METHODOLOGY

Canada Mortgage and Housing Corporation (CMHC) conducts the **Rental Market Survey (RMS)** every year in October to estimate the relative strengths in the rental market. The survey is conducted on a sample basis in all urban areas with populations of 10,000 and more. The survey targets only structures with at least three rental units, which have been on the market for at least three months. The data collected for a structure depends on its initiation type (public or private), and whether it is an apartment or a row structure. The survey collects vacant unit data for all sampled structures. The market rent data are collected for only privately initiated structures. The available unit data are obtained only for privately initiated apartment or row structures. Most data contained in this publication refer to privately initiated apartment structures.

The survey is conducted by a combination of telephone interviews and site visits, and information is obtained from the owner, manager, or building superintendent. The survey is conducted during the first two weeks of October, and the results reflect market conditions at that time.

Definitions

Availability: A rental unit is considered available if the existing tenant has given, or has received, notice to move, and a new tenant has not signed a lease; or the unit is vacant (see definition of vacancy below).

Rent: The rent refers to the actual amount tenants pay for their unit. No adjustments are made for the inclusion or exclusion of amenities and services such as heat, hydro, parking, and hot water. For available and vacant units, the rent is the amount the owner is asking for the unit.

It should be noted that the average rents reported in this publication provide a sound indication of the amounts paid by unit size and geographical sector. Utilities such as heating, electricity and hot water may or may not be included in the rent. The changes in average rent do not necessarily correspond to rent changes within a given structure. The increase or decrease of the average rents between two years may or may not be statistically significant due to other factors such as the variability of the rents.

Rental Apartment Structure: Any building containing three or more rental units, of which at least one unit is not ground oriented. Owner-occupied units are not included in the rental building unit count.

Rental Row (Townhouse) Structure: Any building containing three or more rental units, all of which are ground oriented with vertical divisions. Owner-occupied units are not included in the rental building unit count. These row units in some centres are commonly referred to as townhouses.

Vacancy: A unit is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Definitions of Census Areas referred to in this publication are as follows:

A census metropolitan area (CMA) or a census agglomeration (CA) is formed by one or more adjacent municipalities centred on a large urban area (known as the urban core). The census population count of the urban core is at least 10,000 to form a census agglomeration and at least 100,000 to form a census metropolitan area. To be included in the CMA or CA, other adjacent municipalities must have a high degree of integration with the central urban area, as measured by commuting flows derived from census place of work data. CMAs and CAs contain whole municipalities or Census Subdivisions.

All data presented in this publication is based on Statistics Canada's 2001 Census area definitions.

Acknowledgement

The Rental Market Survey could not have been conducted without the cooperation of the rental property owners, managers and building superintendents throughout Canada. CMHC acknowledges their hard work and assistance in providing timely and accurate information. As a result of their contribution, CMHC is able to provide information that benefits the entire housing industry.

Information and Subscriptions

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